

**Request for Proposal 18-017**  
**Electronic Document Management Solution**  
**Indiana Department of Motor Vehicles**

Pre-Proposal Conference

September 14, 2017  
2:00 p.m. EST

Lottie Hooyer, Senior Account Manager  
Indiana Department of Administration

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# General Information

- Sign-In Sheet for Attendees
- Sign-In Sheet and PowerPoint will be posted on IDOA's Solicitation Website
- Questions regarding RFP scope of work, process, and scoring will be answered in this session
  - *Any verbal response is not considered binding; respondents are encouraged to submit any question formally in writing if it affects the proposal that will be submitted to the state.*

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# Purpose of the RFP

The purpose of this RFP is to select a vendor that can satisfy the State's need for an Electronic Document Management Solution. It is the intent of the Indiana BMV/C to contract with a qualified vendor that provides a comprehensive, state of the art EDMS to the Indiana BMV/C for managing BMV/C documents.

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# Term of Contract

## Contract Term:

- The State intends to sign a contract with one Respondent to fulfill the requirements in this RFP.
- The term of the contract shall be for a period that includes the Implementation Timeline and a four (4) year Maintenance with the option to renew at the State's discretion.

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# Key Dates

Activity	Date
Issue of RFP	September 7, 2017
Pre-Proposal Conference	September 14, 2017
Deadline to Submit Written Questions	September 20, 2017
Response to Written Questions/RFP Amendments	September 29, 2017
Deadline to Submit Intent to Respond Form	October 4, 2017
Submission of Proposals	November 2, 2017
The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.	
Proposal Evaluation	TBD
Proposal Discussions/Clarifications (if necessary)	TBD
Oral Presentations (if necessary)	November 29, 2017
Best and Final Offers (if necessary)	TBD
RFP Award Recommendation	TBD

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# Business Proposal

(Attachment E)

- **Company Financial Information (Section 2.3.3)**
  - Confidential information must be kept separate from the proposal in the electronic copies. IDOA recommends that Respondents provide two separate files, **one Confidential and one Public**.
- **Contract Terms (Section 2.3.5)**
  - Respondent should review sample State contract and note exceptions to State mandatory and non-mandatory clauses in Business Proposal and Transmittal Letter

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# Technical Proposal

(Attachment F)

- Please use the Template we have provided for you.
- Where appropriate, supporting documentation may be referenced by a page and paragraph number.

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# Cost Proposal

(Attachment D)

- Please use the template provided for the Cost Proposal.
- Cost scores will be normalized to one another, based on the lowest cost proposal evaluated. The lowest cost proposal receives a total of 25 points. The normalization formula is as follows:

*Respondent's Cost Score = (Lowest Cost Proposal / Total Cost of Proposal) X 25*

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# Proposal Preparation

- Attachment D (Cost Proposal) must be returned in the original **Excel** format. (No PDFs)
- Use the templates provided for all responses
- Do not alter any templates
- Submit all questions via email using the Q&A Template (Attachment G) by **September 20 at 3:00PM EST** to **[Lhooyer@idoa.in.gov](mailto:Lhooyer@idoa.in.gov)**

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# Proposal Preparation

- Buy Indiana, Business Proposal (2.3.14)
  - Status shall be finalized by proposal due date
  - 5 definitions, details provided in Business Proposal
- Indiana Economic Impact, Attachment C
  - Definition of FTE (Full-Time Equivalent)
  - Example: If a Respondent has 5 full time employees and is bidding on its 5<sup>th</sup> contract, and all contracts get an equal amount of commitment from the employees then each employee commits 20% of his or her time to the new contract:
    - $0.2 \times 5 \text{ employees} = 1 \text{ FTE}$ .

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# Evaluation Criteria

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business Proposal, Technical Proposal, Implementation Proposal, Oral Presentations and Demonstrations, Contract Negotiations)	50 available points
3. Cost (Cost Proposal)	25 available points
4. Indiana Economic Impact	5
5. Buy Indiana	5
6. Minority Business Enterprise Subcontractor Commitment	5 (1 bonus point is available, see <a href="#">Section 3.2.4</a> )
7. Women Business Enterprise Subcontractor Commitment	5 (1 bonus point is available, see <a href="#">Section 3.2.4</a> )
8. Indiana Veteran Business Enterprise (IVOSB) Subcontractor Commitment	5 (1 bonus point is available, see <a href="#">Section 3.2.5</a> )
Total	100 (103 if bonus awarded)

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# Minority and Women's Business Enterprises

- Complete Attachment A, MWBE Form
  - Submit separate MWBE forms in proposal
  - Include sub-contractor letters of commitment in proposal
- Goals for Proposal
  - 8% Minority Business Enterprise
  - 8% Women's Business Enterprise

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**ATTACHMENT A**  
**MINORITY & WOMEN'S BUSINESS ENTERPRISES RFP SUBCONTRACTOR**  
**COMMITMENT FORM**

In accordance with 25 IAC 5-5, the respondent is expected to submit with its proposal a MWBE Subcontractor Commitment Form. The Form must show that there are, participating in the proposed contract, Minority Business Enterprises (MBE) and Women Business Enterprises (WBE) listed in the Minority and Women's Business Enterprises Division (MWBED) directory of certified firms located at <http://www.in.gov/idoa/2352.htm>. If participation is met through use of vendors who supply products and/or services directly to the Respondent, the Respondent must provide a description of products and/or services provided that are directly related to this proposal and the cost of direct supplies for this proposal. Respondents must complete the Subcontractor Commitment Form in its entirety.

Failure to meet these goals will affect the evaluation of your Proposal. The Department reserves the right to verify all information included on the MWBE Subcontractor Commitment Form.

Respondents are encouraged to contact and work with MWBED at 317-232-3061 to design a subcontractor commitment to meet established goals as referenced in this solicitation.

**Prime Contractors must ensure that the proposed subcontractors meet the following criteria:**

- Must be listed on the IDOA Directory of Certified Firms, on or before the proposal due date
- Each firm may only serve as one classification – MBE, WBE or IVBE (see Section 1.22)
- A Prime Contractor who is an MBE or WBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.
- Must serve a commercially useful function. The firm must serve a value-added purpose on the engagement.
- Must provide goods or service only in the industry area for which it is certified as listed in the directory at <http://www.in.gov/idoa/2352.htm>
- Must be used to provide the goods or services specific to the contract
- National Corporate Diversity Plans are generally not acceptable

**MINORITY & WOMEN'S BUSINESS ENTERPRISES RFP SUBCONTRACTOR LETTER OF**  
**COMMITMENT**

A signed letter(s), on company letterhead, from the MBE and/or WBE must accompany the MWBE Subcontractor Commitment Form. Each letter shall state and will serve as acknowledgement from the MBE and/or WBE of its subcontract amount, a description of products and/or services to be provided on this project, and approximate date the subcontractor will perform work on this contract. The State reserves the right to deny evaluation points if the letter(s) is not attached. The State may deny evaluation points if the letter(s) is not attached, not on company letterhead, not signed and/or does not reference and match the subcontract amount and the anticipated period that the Subcontractor will perform work for this solicitation.

By submission of the Proposal, the Respondent acknowledges and agrees to be bound by the regulatory processes involving the State's M/WBE Program. Questions involving the regulations governing the MWBE Subcontractor Commitment Form should be directed to: Minority and Women's Business Enterprises Division at (317) 232-3061 or <http://www.in.gov/idoa/2352.htm>.



# Minority and Women's Business Enterprises

Prime Contractors must ensure that the proposed subcontractors meet the following criteria:

- Must be listed on the IDOA Directory of Certified Firms, on or before the proposal due date
- Each firm may only serve as one classification – MBE, WBE or IVBE
- A Prime Contractor who is an MBE or WBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.
- Must serve a **commercially useful function**. The firm must serve a value-added purpose on the engagement.
- Must provide goods or service only in the industry area for which it is certified as listed in the directory at <http://www.in.gov/idoa/2352.htm>
- Must be used to provide the goods or services specific to the contract
- National Corporate Diversity Plans are generally not acceptable

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# Minority and Women's Business Enterprises

RFP#

DUE DATE:

TOTAL BID AMOUNT:

<input type="checkbox"/> MBE Firm	<input type="checkbox"/> WBE Firm		
Company Name:		Contact Person:	
Address:		E-mail:	
		Telephone Number: ( )	Fax Number: ( )
Sub-Contract Amount:		Describe service/product to be provided:	
Sub-Contract Percentage of Total Bid:			
Provide approximate dates when Sub-Contractor will perform on this project:			

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# Minority and Women's Business Enterprises

- **Effective August 2014, the following MWBE scoring methodology is utilized for all RFP releases**
- **New Process** – MWBE scoring is conducted based on 10 points plus a possible 2 bonus points scale
  - MBE: Possible 5 points + 1 bonus point
  - WBE: Possible 5 points + 1 bonus Point

- **Professional Services Scoring Methodology:**

- The points will be awarded on the following schedule:

%	1%	2%	3%	4%	5%	6%	7%	8%
Pts.	.625	1.25	1.875	2.5	3.125	3.75	4.375	5.0

- Fractional percentages will be rounded up or down to the nearest whole percentage
  - If the respondent's commitment percentage is rounded down to 0% for MBE or WBE participation the respondent will receive 0 points.
  - Submissions of 0% participation will result in a deduction of 1 point in each category
  - The highest submission which exceeds the goal in each category will receive 6 points (5 points plus 1 bonus point). In case of a tie both firms will receive 6 points

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# Minority and Women's Business Enterprises

## RFP MWBE Scoring Example

Bidder	MBE %	Pts.	WBE %	Pts.	Total Pts.
Bidder 1	12.0%	5.0	10.0%	6.0	11.0
Bidder 2	6.0%	3.75	4.0%	2.5	6.25
Bidder 3	8.0%	5.0	8.0%	5.0	10.0
Bidder 4	16.0%	6.0	0.2%	0.0	6.0
Bidder 5	0.0%	-1.0	0.0%	-1.0	-2.0

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# Indiana Veteran Business Enterprise

- Complete **Attachment A1**, IVBE Form
  - Include sub-contractor letters of commitment
- Goals for Proposal
  - 3% Veteran Business Enterprise

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**ATTACHMENT A1**  
**INDIANA VETERANS' BUSINESS ENTERPRISE RFP SUBCONTRACTOR**  
**COMMITMENT FORM**

In accordance with Section 1.22 of RFP 15-00, the respondent is expected to submit with its proposal An IVBE Subcontractor Commitment Form. The Form must show that there are, participating in the proposed contract, Indiana Veterans' Business Enterprises (IVBE) listed in the VetBiz Registry, <http://www.vetbiz.gov/>, that conform to the IVBE rules as laid out at <http://www.in.gov/idoa/2862.htm>.

If participation is met through use of vendors who supply products and/or services directly to the Respondent, the Respondent must provide a description of products and/or services provided that are directly related to this proposal and the cost of direct supplies for this proposal. Respondents must complete the Subcontractor Commitment Form in its entirety.

Failure to address these goals may affect the evaluation of your Proposal. The Department reserves the right to verify all information included on the IVBE Subcontractor Commitment Form.

**Prime Contractors must ensure that the proposed subcontractors meet the following criteria:**

- Must be listed on Federal Center for Veterans Business Enterprise VetBiz registry, on or before the proposal due date
- Must qualify as a Buy Indiana Business under designation 1, on or before the proposal due date. See section 2.7 for more information
- Each firm may only serve as one classification – MBE, WBE (see Section 1.21) or IVBE
- A Prime Contractor who is an IVBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.
- Must serve a commercially useful function. The firm must serve a value-added purpose on the engagement.
- Must provide goods or service only in the industry area for which it is certified as listed in the VetBiz directory <http://www.in.gov/idoa/2352.htm>
- Must be used to provide the goods or services specific to the contract

**INDIANA VETERANS' BUSINESS ENTERPRISES RFP SUBCONTRACTOR LETTER OF**  
**COMMITMENT**

A signed letter(s), on company letterhead, from the IVBE must accompany the IVBE Subcontractor Commitment Form. Each letter shall state and will serve as acknowledgement from the IVBE of its subcontract amount, a description of products and/or services to be provided on this project, and approximate date the subcontractor will perform work on this contract. The State reserves the right to deny evaluation points if the letter(s) is not attached. The State may deny evaluation points if the letter(s) is not attached, not on company letterhead, not signed and/or does not reference and match the subcontract amount, subcontract amount as a percentage of the "TOTAL BID AMOUNT" and the anticipated period that the Subcontractor will perform work for this solicitation.

By submission of the Proposal, the Respondent acknowledges and agrees to be bound by the regulatory processes involving the State's IVBE Program. Questions involving the regulations governing the IVBE Subcontractor Commitment Form should be directed to: [indianaveteranspreference@idoa.in.gov](mailto:indianaveteranspreference@idoa.in.gov)



# Indiana Veteran Business Enterprise

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- A Prime Contractor who is an IVBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.
- Must serve a commercially useful function. The firm must serve a value-added purpose on the engagement.
- Must provide goods or service only in the industry area for which it is certified as listed in the VetBiz directory <http://www.in.gov/idoa/2352.htm>
- Must be used to provide the goods or services specific to the contract

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# Indiana Veteran Business Enterprise

- Complete **Attachment A1**, IVBE Form
  - Include sub-contractor letters of commitment
- Goals for Proposal
  - 3% Veteran Business Enterprise

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**ATTACHMENT A1**  
**INDIANA VETERANS' BUSINESS ENTERPRISE RFP SUBCONTRACTOR**  
**COMMITMENT FORM**

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If participation is met through use of vendors who supply products and/or services directly to the Respondent, the Respondent must provide a description of products and/or services provided that are directly related to this proposal and the cost of direct supplies for this proposal. Respondents must complete the Subcontractor Commitment Form in its entirety.

Failure to address these goals may affect the evaluation of your Proposal. The Department reserves the right to verify all information included on the IVBE Subcontractor Commitment Form.

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- Each firm may only serve as one classification – MBE, WBE (see Section 1.21) or IVBE
- A Prime Contractor who is an IVBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.
- Must serve a commercially useful function. The firm must serve a value-added purpose on the engagement.
- Must provide goods or service only in the industry area for which it is certified as listed in the VetBiz directory <http://www.in.gov/idoa/2352.htm>
- Must be used to provide the goods or services specific to the contract

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By submission of the Proposal, the Respondent acknowledges and agrees to be bound by the regulatory processes involving the State's IVBE Program. Questions involving the regulations governing the IVBE Subcontractor Commitment Form should be directed to: [indianaveteranspreference@idoa.in.gov](mailto:indianaveteranspreference@idoa.in.gov)



# Indiana Veteran Business Enterprise

➡ **TOTAL BID AMOUNT:** \_\_\_\_\_

➡ Company Name:	Contact Person:	
➡ Address:	E-mail:	
➡ Sub-Contract Amount:	Telephone Number: (   )	Fax Number: (   )
➡ Sub-Contract Percentage of Total Bid:	Describe service/product to be provided:	
Provide approximate dates when Sub-Contractor will perform on this project:		

➡

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# Indiana Veteran Business Enterprise

**New Process** – IVBE scoring is conducted based on 5 points plus a possible 1 bonus point scale

- IVBE: Possible 5 points + 1 bonus point

- **Professional Services Scoring Methodology:**

- The points will be awarded on the following schedule:

%	0%	0.6%	1.2%	1.8%	2.4%	3%
Pts.	-1	1	2	3	4	5

- Fractional points will be awarded based upon a graduated scale between whole points. (e.g. a 0.3% commitment will receive .5 points and a 1.5% commitment will receive 2.5 points)
- Submissions of 0% participation will result in a deduction of 1 point in each category
- The highest submission which exceeds the goal in each category will receive 5 points (5 points plus 1 bonus point). In case of a tie both firms will receive 6 points.

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# Additional Information

## IDOA PROCUREMENT LINKS AND NUMBERS

<http://www.in.gov/idoa/2354.htm>

1-877-77BUYIN (8946) For Vendor Registration Questions

<http://www.in.gov/idoa/2464.htm>

For Inquiries Regarding Substantial Indiana Economic Impact

- A. <http://www.in.gov/idoa/2467.htm>  
Link to the developing “one stop shop” for vendor registry with IDOA and Secretary of State.
- B. Secretary of State of Indiana:  
Can be reached at (317) 232-6576 for registration assistance. [www.in.gov/sos](http://www.in.gov/sos)
- C. See Vendor Handbook:  
Online version available at [http://www.in.gov/idoa/files/vendor\\_handbook.doc](http://www.in.gov/idoa/files/vendor_handbook.doc)
- D. Minority and Women Owned Business Enterprises:  
[http://www.in.gov/idoa/files/Certification\\_List\(48\).xls](http://www.in.gov/idoa/files/Certification_List(48).xls) for table of IDOA certified MBEs and WBEs. For more WBE’s information <http://www.in.gov/idoa/2352.htm>
- E. Veteran’s Business Enterprise Program:  
<https://www.vip.vetbiz.gov/> for a search of certified IVBE’s. For more IVBE’s information <http://www.in.gov/idoa/2862.htm>
- F. RFP posting and updates:  
Go to <http://www.in.gov/idoa/2354.htm> (select “State of Indiana Opportunities” link)  
Drag through table until you find desired RFP/RFI number on left-hand side and click the link.

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# Any Questions?

Any verbal response is not considered binding; respondents are encouraged to submit any question formally in writing if it affects the proposal that will be submitted to the state.

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# Thank You!

Lottie Hooyer

[lhooyer@idoa.in.gov](mailto:lhooyer@idoa.in.gov)

Phone: 317-234-9757

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